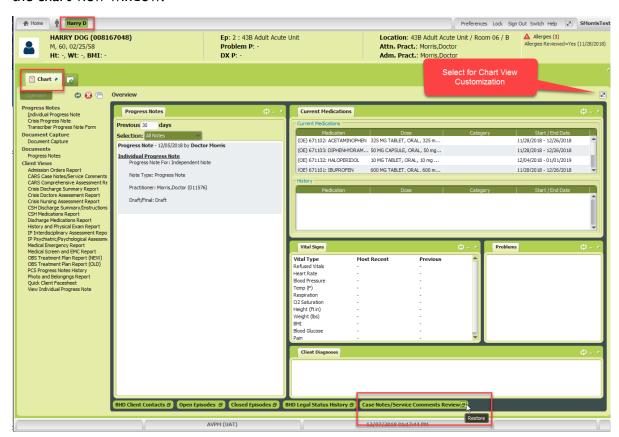




**Case Notes Widget and Report**- this new widget available in Chart View displays client case notes/service comments documentation from community providers using ProviderConnect.

The Case Notes/Service Comments Review Widget was created to enhance end-user ability to quickly access client case notes documented in ProviderConnect. The widget displays notes for the last 60 days. Use the Case Notes/Service Comments Report to access case notes prior to the last 60 days.

To access the widget, select the client and go to the Chart View. The widget is minimized on the bottom of the chart view window.



**NOTE**- If you've customized Chart View, you'll need to 'reload chart' in the customization window to take advantage of the newly added widget. Access the <u>BHD Training Website</u> for a tip sheet on Reloading Home View and Chart View Widgets.

Last Modified 12/7/2018 I Avatar General



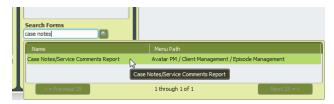
To restore (maximize) the widget, click on the small squares icon Restore to the right of the widget name.



The widget appears full size in the chart view and lists the Date of Service, Program, Provider and Service Comments. Undock the widget as needed to see service comments in a larger window or minimize to have the widget returned to the bottom of the Chart View screen.



Case Notes/Service Comments Report- this report provides a list of case notes/service comments within a given date range. In the forms search field, enter case notes and select the report.



Enter the Client MRN, Program, Start and End date and select Process.

